

**Appendix A**

**PROJECT SPECIFICATION**

DEFENCE INFRASTRUCTURE  
ORGANISATION  
REGIONAL DELIVERY  
UNITED STATES FORCES

SPECIFICATION

CONTRACT FOR  
QUANTITY SURVEYING  
SERVICES

DIO CONTRACT NO. 702895451

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## **Specification**

### **1. Introduction**

1.1 Defence Infrastructure Organisation, Regional Delivery, United States Forces (DIO) procures, manages and delivers maintenance and construction works in support of Ministry of Defence (MOD) establishments used by the United States Visiting Forces (USVF).

1.2 This requirement is to be awarded using the Crown Commercial Services (CCS) Framework RM 6165 Lot 5 (CCS Framework). In this and any other document associated with this tender all references to Quantity Surveyor Service Provider (QSSP) will be the Consultant whilst all references to Quantity Surveyor (QS) will refer to the core discipline of Cost Consultant as set out in the CCS Framework.

1.3 Requirements within this specification are additional or expand on the requirements within the CCS Framework.

### **2. Requirement**

2.1 The requirement is to provide a Quantity Surveying Service (QS Service) to deliver cost management and cost assurance services to DIO in support of DIO management and assurance activities.

2.2 The service will be to support specific establishments and for each establishment the Quantity Surveyor Service Provider (QSSP) will identify a Quantity Surveyor (QS) who will be the primary focal point for each establishment and who will be primarily responsible for delivery of the service for the establishment. In addition to the primary focal point the QSSP will provide additional resource to support the workload of any establishment.

2.3 To provide the service the QS is required to be based on site to enable the QS to visit the site of works and to interact with the DIO, IP and USVF site teams. The method of payment for this service will be Time Charges: Daily Rate.

2.4 DIO may require additional QS to be provided on a short-term basis for specific tasks or to support unexpected peaks in workload. The method of payment for this service will be Time Charges: Hourly Rate

2.5. DIO may also require support from a Higher QS to assist DIO in the resolution of tasks which DIO considers are outside the scope of the QS. The method of payment for this service will be Time Charges: Hourly Rate.

### **3. Overview of the DIO Industry Partner (IP) contracts.**

3.1 DIO has two main pipelines for the delivery of maintenance and construction works for which the QSSP will be required to provide the QS Service.

#### **3.1.1 Core Services**

These comprise two Base Management Contracts (BMC) primarily for the delivery of cyclical maintenance, reactive repairs up to a predetermined Inclusive Repair Limit (IRL) and minor Additional Works Services (AWS) over and above the IRL Pricing of minor AWS is based on quotations, time, materials and plant principles.

The two BMC are programmed to be replaced from late 2022 through to 2023 with 5 new BMC. On these new contracts pricing of Minor AWS will be primarily using the National Schedule of Rates (NSR) with exceptions based on quotations, time, materials and plant principles. The dates for the changeover to the 5 contracts are subject to change and no increase to the rates or grade will be considered for this change.

#### 3.1.2. Project Works/Additional Works Services.

This comprises higher value works which would not normally be executed by the BMC. These works are currently delivered utilising the SCAPE frameworks, awarded on the New Engineering Contracts (NEC). DIO has adopted NEC Option A. (Priced Contract with Activity Schedule) as its pricing strategy. Generally, the value of individual projects does not exceed the United Kingdom Public Procurement (Agreement on Government Procurement) (Thresholds) (Amendment) Regulations 2021.

During the life of the QS Service contract DIO may utilise other IP arrangements and no increase to the rates or grade will be considered in the event of change.

### **4. Description of Services to be provided.**

4.1 The QS Service Provider will provide suitably qualified and experienced QS resources to deliver the following tasks:

- a) Preparation of estimates and general cost advice.
- b) Financial review/tender evaluations.
- c) Financial review/tender evaluations of variation/change requirements.
- d) Measurement and valuation of works during the construction period.
- e) Review IP final accounts.
- f) Carrying out works completion checks to assure value for money and to confirm the costs described within the accepted offer, any subsequent changes to the cost and the final account have are representative of the works installed.
- g) Joint measurement with IP.
- h) Review of risk registers.
- i) Providing reports and recommendations to DIO on all tasks.
- j) Supporting DIO in negotiations of the price and leading those negotiations where required.
- k) Dispute resolution in conjunction with DIO.
- l) Updating DIO on progress and issues with any task when requested by DIO.
- m) Other ad-hoc tasks within the scope of a Quantity Surveyor.
- n) Identify areas for challenge in any priced submissions submitted by the IP and resolving these challenges with the IP.

4.2 For each task the QS will provide and issue a Task Report (TR) to DIO in electronic format. Unless identified to the contrary by DIO the default TR will be a value for money statement. This will identify to DIO the criteria used by the QS Service provider in establishing value for money. Where value for money cannot be established the TR shall clearly identify any outstanding issues for DIO action.

4.3 The TR will be formatted as a minimum to identify for DIO.

- a) Task Number/Order Number or the like.
- b) DIO Point of Contact for Task.
- c) QS Point of contact for task.
- d) Establishment.

- e) Description.
- f) IP and Contract Reference.
- g) Estimated Value.
- h) IP Original value.
- i) Criteria used to establish value for money.
- j) Final Value following QS review.
- k) Findings/Issues and Recommendations.

4.4 The QS will attach all associated supporting information related to the TR in electronic format. This will include but not be limited to for example hard copy documentation such as IP offers which have been annotated by the QS and which shall be scanned into PDF format.

4.5 The QS Service Provider will prepare templates for all TR during the mobilisation period and issue these to the DIOQS for comment 30 days following Award of the contract for DIO review and comment.

## **5. Management of the Quantity Surveying Services.**

5.1 The QSSP will provide a Customer Relationship Manager to provide a management function of the QS and to take responsibility for the professional management and quality of outputs of the QS and to liaise with DIO.

5.2 For each establishment a member of DIO staff will be identified as a main contact, QS liaison and focal point.

5.3 The DIO Quantity Surveyor (DIOQS) will provide DIO Professional oversight of the QSSP and is the designated focal point for the Professional Management of the contract. The QSSP will consult with the DIOQS and DIO Commercial for guidance and rulings relating to matters of interpretation of the IP contracts.

5.4 For each establishment a member of DIO staff will be identified as a main contact, QS liaison and focal point.

## **6. Tasking of the QSSP**

6.1 Tasking will be direct to the QS primary focal point for each establishment. DIO will issue a tasking instruction (TI) in the form of an e-mail which will identify the service to be carried out. All supporting information for the task will be provided electronically.

6.2 The QS primary focal point will respond to the DIO requestor to acknowledge the TI within one working day, confirming if they or another member of the QSSP team is to deliver the service.

6.3 Where a specific return date is required, DIO will identify the urgency of the task and will provide a required return date. The QSSP will review this date and within one day of receipt of the task instruction either accept the required return date or propose an alternative date for mutual agreement with DIO. Where a return date is not specified the default return date will be 20 working days after the issue of the TI. Where the return is delayed by others outside of the QSSP's control the return date may be adjusted and the impact of any delay reported separately.

## **7. Attendance/Payment.**

7.1 Payment will be based on the Time Charges identified within the pricing document.

7.2 Time Charges: Daily Rate (DR).

7.2.1 The DR rate will be based on 8 working hours per day on site and will apply to the QS supporting establishments. DIO has adopted a smarter working policy for its own staff and DIO may agree for the QS to work remotely. A separate pricing point is identified for remote working and this will apply in the event the QS works remotely for any reason with DIO agreement.

7.2.2 When working at an establishment all start and finish times are based on reporting to the DIO office or as otherwise directed.

7.2.3 The QSSP will provide the service between 07.30 hours to 17.00 hours to ensure contact with DIO staff.

7.2.4 For Primary Establishments the QS is required to be in attendance for the full working day. It is envisaged that for Secondary Establishments attendance will commence from and complete at a Primary or Secondary establishment unless otherwise directed by DIO.

7.3 Time Charges: Hourly Rate (HR) The HR rate will apply for ad-hoc tasks and if required to support unexpected peaks in workload to supplement the Primary focal point QS.

7.4 DIO may invite a firm lump sum for specific one-off tasks which will be priced in accordance with the HR.

7.5 The time charges include for the following

- a) All costs of all staff involved in the service.
- b) All general company overheads and remuneration.
- c) Administration and management and supervision of the contract generally.
- d) All services related overheads and expenses including but not limited to secretarial services, photocopying, word processing, data processing, computer services, typing, binding and reproducing, delivery to DIO, reproducing standard forms from masters supplied by DIO, comptometer services, postage, telephone and facsimile charges, all stationery and other consumables, training, PPE, H&S, QA, Assurance, IT hardware and software, reference materials, courier services, travel and transport, subsistence and out of pocket expenses and the like.

7.6 The QSSP will ensure that in the event any of the QS are unavailable for any reason, DIO is to be consulted and if required the QSSP will make available an alternative QS resource.

7.7 Bank and Public Holidays

There is no requirement for the service to be provided on these days.

7.8 The QSSP will ensure all time is approved by the local DIO focal point or other requester on a weekly basis. The time recording system will identify the QS, Establishment, Task and time spent on each task.

7.9 The QSSP shall submit applications for payment on a monthly frequency in arrears showing a summary of charges for each QS and Establishment supported by copies of all time records duly authorised by DIO.

7.10 Prior to submission of the applications the QSSP will have provided all progress reports and KPI and the mid-monthly update of expenditure for the month for which payment is claimed.

7.11 The QSSP will retain a list of DIO focal points or other requestors and issue this to the DIO QS for approval. This list will be updated whenever the QSSP or DIOQS identify a change.

7.12 To assist with monitoring spend the QSSP will issue a mid-monthly update of expenditure to the DIOQS within 3 working days of the 15<sup>th</sup> day of the month. This will be for guidance and is to be 90% accurate.

## **8. Accommodation/Facilities.**

8.1 Accommodation: At the Primary establishments a minimum of a pre bookable hot desk workstation will be provided within the DIO offices for when the QS is in attendance. At primary establishments welfare facilities at the DIO offices will be available for the use of the QS. Secondary establishments do not have DIO offices, but limited welfare facilities may be available at the discretion of the occupiers of the establishment.

8.2 Facilities: Within the DIO offices, light; heat, power and photocopying facilities for use on the service will be supplied free of charge. Use of fixed telephones will be permitted for use on the contract but cannot be guaranteed and the QS Service Provider should ensure that the QS has alternative communications.

## **9. Contractors Information Technology (IT).**

The QS service provider will provide the following IT hardware and software for each QS.

8.1 Hardware: Laptops or personal computers, printers, scanners, and any other peripherals necessary. The IT shall be fully connected to the internet via a data connection. The QS Service Provider will not be permitted use of MOD IT equipment or given access to MOD networks and will be required to utilise for example commercially available mobile internet services.

8.2 Software: Each laptop or personal computer is to be complete with software compatible with Microsoft Office and .dwg and .pdf formats as a minimum to ensure compatibility with DIO and the IP. Each laptop or personal computer is to be fully connected to the internet for e-mail and browsing purposes.

8.3 Estimating Tools: Each QS will be provided with access to pricing and estimating information and software either in electronic or hardcopy formats.

8.4 The QSSP will provide access to all information required to deliver the service. This will include but not be limited to standard forms of contract, British Standards and the like.

## **10. DIO Provided Information Technology (IT).**

## 10.1 Core Services contracts.

10.1.1 The IP will be utilising web-based technology to allow DIO access to the IP's Information Management Systems (IMS) and Computer Aided Facility Management (CAFM) systems. The QSSP will be allowed access to these systems either through its own laptops via a web portal connection or if this it is not possible DIO will provide laptops. DIO will be responsible for any licensing costs.

## 10.2 General Data Access

10.2.1 DIO will also allow the QSSP access to its sharepoint site for access to contract and task information through the DIO provided Laptops.

## 10.3 DIO Provided Laptops

10.3.1 DIO will issue a laptop to each of the QS focal points for use on this contract. The QSSP will comply with any DIO and MoD requirements for the management and control of provided laptops.

## 10.4 Availability of DIO Provided Information Technology (IT).

In the event DIO does not provide IT (either in part or whole) DIO will ensure all information available to complete each task is provided to the QSSP and no additional costs will be considered from the QSSP for DIO failure to provide IT.

# 11. Contract Information for IP contracts.

11.1 DIO will make available all relevant contract information for the IP contracts in electronic format. This will include Commercially sensitive information concerning the IP rates and prices. The QSSP shall comply with all confidentiality and security requirements and arrange for staff to sign any confidentiality agreements required by DIO.

11.2 The QSSP will provide all standard forms of contract and any other commercially available documentation required.

# 12. Progress Reports

12.1. The QSSP will maintain a task log report identifying progress against every TI in Microsoft excel format and issue these electronically to the DIO QS and other DIO staff as nominated. All reports will include the capability to query and sort information.

## 12.2 Monthly Progress Report

The monthly progress report is to be issued for each Establishment a maximum of 3 working days following the end of the calendar month to which it applies and will include the following information for each task.

- a) Reference Number.
- b) Establishment.
- c) Description.
- d) Category (Example: AL09/ Delivery Agreement/Compensation Event)

- d) DIO Point of Contact for Task.
- e) Date QSSP received task.
- f) Value of IP offer.
- g) QSSP recommended value.
- h) Agreed response date for the task report.
- i) Date QQSP provided the TR to DIO.
- j) Days delay in issuing the TR where the control is outside of the QSSP responsibility.
- k) Explanation or reasons for delay in providing the TR.
- l) Time allocated by the QS to each TR.
- m) Identify live and completed tasks

### 12.3 Change to Core Service (CCS) Reports.

CCS reports are to be issued weekly within two working days of the end of the week to which it applies. The CCS report is to include all establishments split between East and West and will include the following information for each task.

- a) Reference Number.
- b) Establishment.
- c) Description.
- e) Date QSSP received task.
- f) QS allocated to the CCS.
- h) Date QQSP provided TR to DIO.
- k) Identify live and completed tasks.
- l Further comments.
- j) Time allocated by the QS to each TR.

12.4 All Progress Reports will be kept updated and made available to DIO on request.

## **13. Contract Administration Meetings.**

### 13.1 Mobilisation.

13.1.1 The QSSP will provide a mobilisation plan with the tender submission. Within 5 working days following Award of the Quantity Surveying Services Contract the mobilisation plan will be reissued taking into account the award date and ISD. Within 10 working days of the Award the QSSP will arrange and hold an initial mobilisation meeting with DIO. During the mobilisation period the overall strategy of the contract will be developed, performance criteria and procedures identified, and forms and drafts will be developed. Subsequently the QSSP will liaise with DIO and provide weekly updates of the progress of mobilisation to DIO.

13.1.2 During the mobilisation period the QSSP will contact all Primary establishments to ensure a level of familiarisation with DIO Focal points who will manage the QS.

13.1.3 Where the QSSP staff require base passes the QSSP is to ensure that applications are made in good time for the necessary security clearances to be obtained and passes issued.

13.1.4 Two weeks prior to ISD the QSSP will arrange and hold a pre-start meeting with DIO to identify any outstanding information required. The pre-start meeting will finalise the overall strategy of the contract, performance required, procedures to be adopted and confirm handover of standard forms and drafts that will be required for the execution of this contract.



13.1.5 One month after ISD the QSSP will attend a further meeting to review mobilisation and to finalise any requirements arising from the pre-start meeting.

### 13.2 Post Mobilisation/In Service

13.2.1 Local Monthly Progress Meetings: The QSSP is to keep the DIO local staff updated on the progress of tasks via day to day liaison. Monthly meeting will be called if deemed necessary by the QSSP or DIO.

13.2.2 The Customer Relationship Manager will hold quarterly operational service review meetings with DIO.

13.2.3 In the event performance issues are identified, the Customer Relationship Manager will attend any meetings necessary until the performance issue is resolved.

### 13.3 Demobilisation.

13.3.1 The QSSP shall attend all necessary meetings required to assist with the smooth transition to any new QSSP and the closing out of this contract.

### 13.4 Format of meetings.

#### 13.4.1 Monthly Meetings

The QS will programme the meetings, invite attendees, record the meeting and issue records of the meeting within 2 working days of the meeting.

DIO attendees will be the Local DIO site team and others DIO identifies should attend. The DIOQS will be notified of all monthly meetings.

#### 13.4.2 Quarterly Operational Service Review Meetings.

The Customer Relationship Manager will programme the meetings, invite attendees, record the meeting and issue records of the meeting within 2 working days of the meeting.

DIO Attendees will be the DIOQS, DIO Establishment Focal Points, DIO Commercial and others as required.

#### 13.4.3. Virtual Meetings

Where DIO agrees to hold virtual meetings, the QSSP will host the meetings using Teams or equivalent.

## **14 Workload Management.**

14.1 The QSSP shall monitor workload and turnaround times to ensure a prompt and responsive service and KPI's are identified to measure turnaround times. The QSSP shall not commit additional resources without DIO agreement.

14.2 In the event that workload fluctuates DIO may instruct the QSSP to redirect the QS to support other establishments or may request additional resources. In the event of longer-term fluctuations in the workload DIO may reduce or increase the attendance requirements or restructure the resource requirements.

## **15. Quality Management (QM), Assurance and Continuous Improvement**

15.1 The QSSP will issue a quality plan with the tender. The quality plan will further identify how the quality of the service will be managed and how the QSSP will monitor the outputs of the QS.

15.2 The QSSP will provide an organisational chart showing all roles and responsibilities.

15.3 The QSSP will implement an assurance process to ensure that throughout the duration of the service quality, accuracy and professionalism are maintained and improvements identified and incorporated. The QSSP will implement a review process in which a minimum of 2.5% of all Task Instructions are reviewed and an Assurance Report issued to DIO detailing the findings, and subsequent actions taken. The Assurance Report is to be issued to DIO by the end of the month following the date of issue of the TR.

15.4 The QSSP will ensure the daily attendance of staff is managed and DIO are kept fully updated in the event of any absences and if required provide staff to backfill posts.

## **16. Quantity Surveyor Post Profile.**

The grade of staff will be selected by the QSSP in accordance with the CCS Qualifications and Experience criteria. When selecting the grade, the QSSP shall consider the DIO post profile below and any other requirements of this specification.

16.1 The posts will require a range of skills to deliver the service and any QS appointed by the QSSP will comply with the post profile.

16.2 Professional/External Qualification Required.

The preferred qualification is Member RICS with a minimum of 3 years post qualification experience in a Quantity Surveying role.

16.3 Core Competences/Responsibilities.

a) A focus on delivering value for money to ensure DIO achieves best value for money.

b) Experience of measurement in accordance with SMM 7 and the NRM.

c) Fully conversant with interpreting drawings and specifications to prepare and check quantities, and fully able to carry out measurement on site of completed works to verify the works have been completed in compliance with the IP's offer and Final Account.

d) Preparation of estimates.

e) Preparation of cost plans.

f) Application of risk management techniques.

g) Preparation of tender evaluations.

h) Knowledge and experience of Schedules of Rates used in minor works and maintenance contracts and preferably the NSR.

- i) Knowledge and experience of the measurement and pricing of building, civil engineering, mechanical and electrical installations.
- j) Experience of the NEC suite of contracts.
- k) Experience of SCAPE Frameworks or similar.
- l) A commitment to provide a cost effective and high-quality service.
- m) A team worker able to work within a diverse team including DIO staff, client representatives and IP staff. A flexible approach to ensure the QS service offers best value for money.

## **17. Location of Establishments**

17.1 The QSSP is advised that due to the dispersed nature of the establishments public transport is limited, and that due to the geographical size of the establishments the QSSP shall ensure the QS has suitable transport to minimise the impact of travel times on any charges made to DIO.

## **18. Training**

18. DIO will offer each QS the opportunity to attend any specific familiarisation training provided by DIO or IP relevant to the both the contracts and to any associated DIO processes which will impact on the QS Service.

## **19. Mobilisation/Demobilisation.**

Mobilisation and Demobilisation plans are to be submitted with the tender.

### **19.1 Mobilisation**

19.1.1 The QSSP will submit an initial mobilisation plan with his tender which will identify all actions required to ensure the service will be in place by ISD.

19.1.2 Upon award the QSSP will update the pretender mobilisation plan.

19.1.3 The QSSP will develop the formats for the Monthly Progress report, the Weekly CCS report, the TR and the KPI report and present these to DIO for review within one month following award.

19.1.4 The QSSP shall ensure that at ISD the all IT hardware and software are in place and the QS is resourced to receive tasks by e-mail and to respond to DIO by e-mail.

19.1.5. The QSSP shall ensure that all contact details for all staff are issued to DIO within one week of ISD and the details are updated when a change occurs.

### **19.2 Demobilisation.**

19.2.1 Three months before completion of the contract the QSSP will provide a de - mobilisation programme to DIO to identify all actions to be executed prior to and after completion.

19.2.1 In the event tasks are issued to the QSSP which cannot be completed by the completion of the contract, the QSSP will identify these to DIO and await further instruction.

19.2.2 In the event the QSSP accepts tasks which cannot be completed by the end of the contract, the QSSP will be responsible for resourcing and completing those tasks unless DIO instructs otherwise.

## **20. Key performance Indicators.**

The following KPI are to be reported monthly to DIO and the report issued within 7 working days of the end of the month to which they apply.

### **20.1 KPI 1 Completion of Tasks.**

The number of tasks completed for which the return date exceeds the agreed return date against the number of tasks completed in the preceding month.

### **20.2 KPI 2 Completion of Tasks for the Review of Compensation Events.**

The number of tasks to review compensation events where the completion time exceeds eight working days from receipt of the task against the number of tasks to review compensation events completed in the preceding month.

### **20.3. KPI 3 Assurance.**

Number of Assurance Reports completed within one month following the issue of the Task Report against the number of Assurance Reports due in the preceding month.

## **21. Sustainability**

The tenderer is to identify and implement sustainable policies where within the scope of the service where sustainability can be implemented and improved.

## **22. Definitions**

Days: Working days unless otherwise described.

Month: Calendar Month unless otherwise described.

In Service Date (ISD): Contract Commencement

**ANNEXE A****1. Establishments**

<b>Primary Establishments</b>	<b>Secondary Establishments</b>
<b>Western Establishments</b>	
RAF Alconbury, Huntingdon Cambs PE28 4DB	RAF Molesworth, Huntingdon Cambs PE18 0QB
RAF Fairford, Gloucestershire GL7 6BA	RAF Welford, Newbury Bucks.
RAF Croughton Bracknell Northants	Blenheim Crescent, Ruislip Middlesex
	RAF Barford St John, Bloxham Oxfordshire
RAF Menwith Hill Harrogate Yorkshire	
<b>Eastern Establishments</b>	
RAF Mildenhall Mildenhall Bury St Edmunds Suffolk IP28 8NF	
RAF Lakenheath Brandon Suffolk IP28 8NF	RAF Feltwell Feltwell Norfolk

**Notes**

1. The Establishments include associated off-base installations for example Married Quarters and sewage treatment works.

**2. Resourcing**

This data is not warranted but is provided as an indicative assessment based upon current resources. The requirement for resource may change over the duration of the contract.

<b>Primary Establishments.</b>	<b>Estimated Resource.</b>
RAF Lakenheath	324 Days
RAF Mildenhall	138 Days
RAF Alconbury	105 Days
RAF Croughton and Fairford	222 Days
RAF Menwith Hill*	29 Days
Ad Hoc Resources	776 Hours